



**REGULAR MEETING
UNITED LAGUNA WOODS MUTUAL LANDSCAPE COMMITTEE**

**Thursday, April 8, 2021 – 9:30 a.m.
VIRTUAL MEETING
Laguna Woods Village
24351 El Toro Road, Laguna Woods, CA**

Laguna Woods Village owners/residents are welcome to participate in all open committee meetings and submit comments or questions for virtual meetings using one of three options:

1. Join the Zoom meeting at <https://zoom.us/j/93131082872>
2. Via email to meeting@vmsinc.org any time before the meeting is scheduled to begin or during the meeting. Please use the name United Landscape Committee in the subject line of the email. Name and unit number must be included.
3. By calling (949) 268-2020 beginning one half hour before the meeting begins and throughout the remainder of the meeting. You must provide your name and unit number.

FYI: All landscaping rules and regulations may be found in the United Landscape Manual on the Village website:
<https://www.lagunawoodsvillage.com/documents/view/United-Landscape-Maintenance-Manual-Updated-June-2020.pdf?v=1597776227>

AGENDA

1. Call to Order
2. Acknowledgment of Media
3. Approval of the Agenda
4. Approval of Meeting Report for March 11, 2021
5. Chair Remarks
6. Department Head Update
 - a. Project Log
 - b. Irrigation Water Usage Report
 - c. Landscape Staffing Update
 - d. Landscape Website Format Update

7. Member Comments (Items not on the agenda)
8. Response to Member Comments

Items for Discussion and Consideration

9. Request to Keep Potted Plants in Common Area (Zhao) – 329-D (Tabled at 2/11/21 meeting and again at 3/11/21 meeting)
10. Tree Removal Request: 703-C Calle Aragon (Passehl) - One Bottle Brush tree

Budget Preparation

11. Performance Improvement: Increase Service Levels

Quality & Improvements

12. Repeated issue review and discussion
13. Landscape Equipment Update – New Mowers

Financial

14. Reserve Expenditure Report
15. Operating Expenditure Report

Future Agenda Items

16. Landscape Equipment Review
17. Shrub Bed Maintenance Cycle Report – Quarterly
18. Pine Tree Removal Project

Concluding Business:

19. Committee Member Comments
20. Date of Next Meeting – Thursday, May 13, 2021 at 9:30 a.m.
21. Adjournment

Andre Torng, Chair
Kurt Wiemann, Staff Officer
Eve Morton, Landscape Coordinator
Telephone: 949-268-2565



OPEN MEETING

**REGULAR MEETING OF THE UNITED LAGUNA WOODS MUTUAL
LANDSCAPE COMMITTEE**

Thursday, February 11, 2021 – 9:30 A.M.

VIRTUAL MEETING

**Laguna Woods Village Community Center Board Room
24351 El Toro Road**

REPORT

COMMITTEE MEMBERS PRESENT: Chair – Andre Torng, Brian Gilmore, Neda Ardani

COMMITTEE MEMBERS ABSENT:

OTHERS PRESENT:

ADVISORS PRESENT: Theresa Frost, Annie Zipkin

STAFF PRESENT: Kurt Wiemann, Eve Morton

1. Call to Order

Called to order at 9:30 a.m.

2. Acknowledgment of Media

No media were present.

3. Approval of the Agenda

Director Ardani made a motion to approve the agenda. The committee was in unanimous support.

4. Approval of the Meeting Report for December 10, 2020

Director Ardani made a motion to approve the report. The committee was in unanimous support.

5. Chair's Remarks

Chair Torng stated there are issues on the Report from the last meeting but aren't on today's agenda.

Happy Lunar New Year to everyone! A fifteen-day celebration.

Our goal is to keep residents informed through communication and Directors informed through Key Performance Index Reports.

Our landscape is working hard to provide us with services.

We have KPI (Key Performance Index) reports in this meeting to measure how procedures are working. In the future, we would like to have leading KPI reports and trailing KPI reports.

We are starting the budgeting process for 2022. We will review what the budget includes and how the money is are spent. The committee can provide better support if it knows what and how money is spent.

6. Department Head Update

Mr. Wiemann stated that the landscape department is fully staffed. This includes eight staff positions contracted out for grounds maintenance who work for Third and United Mutuals in Section 1.

We have only lost about a week so far due to the rain. We are looking into seasonal help but that needs to be worked out with the Union.

Advisor Frost asked about staff Standard Operating Procedures (SOP) training. Mr. Wiemann explained there are internal SOPs for new employees. The mulch yard, nursery, and pesticide section get follow all regulations and are regularly inspected by County officials. He explained processes staff must go through to comply with all rules and regulations. We keep safety and maintenance records on all our equipment. Safety is our priority.

Chair Torng requested updates on what training is being done.

Advisor Zipkin asked if there is horticultural training so landscape is pruned and maintained correctly. Mr. Wiemann stated that staff does maintenance but not manicuring of the landscape. We don't have enough staff for manicured landscaping.

The Landscape Manual is a living document and will be updated periodically. Staff will check that all the resolutions regarding landscaping are updated.

We are working on FAQs which will be posted onto the website to help answer some common resident questions. Chair Torng suggested maybe resident compliments be posted on the website also.

Mr. Wiemann reported that preliminary reports show January was the lowest ticket count of any January in the last few years.

Consent:

None

Reports

7. Project Log

Mr. Wiemann reviewed the project log with the committee and answered some questions.

Chair Torng requested actual vs budget comparison, work schedule, inspection report, and invoice/payment audit report

8. KPI Report: Resident Requests Report (Tickets)

Mr. Wiemann reviewed the report with the committee and answered some questions.

Chair Torng commented on Leading KPIs such as workload, efficiency, and effectiveness related. Chair Torng request these KPIs in the future.

9. KPI Report: Shrub Bed Maintenance Cycles

Mr. Wiemann reviewed the report with the committee and answered some questions.

10. Performance Improvements:

a. Mulching Mowers versus Bagging Mowers

Mr. Wiemann reviewed the report with the committee and answered some questions.

Chair Torng requested a financial analysis including cost/benefit and returns analysis; Mr. Wiemann stated that this is a resident satisfaction issue. Chair Torng stated that he would be able to provide a monetary value.

b. Increasing Service Levels

Mr. Wiemann reviewed the report with the committee and answered some questions.

Chair Torng requested cost/benefit comparison among previous, current, and proposed future levels. Mr. Wiemann stated that this is a resident satisfaction issue. Chair Torng stated that he would be able to provide a monetary value.

11. El Toro Water District Bill (For Informational Purposes Only)

Mr. Wiemann reported that an analysis of the United portion of the water bill will be part of the next meeting.

Items for Discussion and Consideration

12. Landscape Request: 329-D (Zhao) – Potted Plants in Garden

Chair Torng made a motion to table this request and to meet with the Member to discuss some alternatives. Director Ardani seconded. The committee was in unanimous support.

Chair Torng and Mr. Wiemann agreed to visit the residence in-person.

13. Tree Removal Request: 533-G Via Estrada (Kim) – One Hollywood Juniper

Chair Torng made a motion to accept staff's recommendation and approve this request. The committee was in unanimous support.

14. Tree Removal Request: 2030-A Avenida Castilla (Grant) - One Weeping Fig

Chair Torng made a motion to accept staff's recommendation and approve this request. The committee was in unanimous support.

Future Agenda Items

15. Updates Made to United Landscape Manual

16. Landscape Equipment Review

17. Accident Report (if available)

18. Cul-de-sac Landscape Activity Quality Review (Committee)

19. Water Usage Report

Concluding Business:

20. Member Comments (Items Not on the Agenda)

Dick Rader (270-D) *"When we had meetings in the community building, the audience would gradually dwindle as the meeting progressed. This is likely happening with our virtual committee meetings as well."*

I raise this point because, contrary to past practice, the landscape committee has assigned member comments to the last item on its agenda.

Since the landscape chairman's emphasis is on resident services and better communication with residents, it would seem important to move member comments to the first part of the meeting. Otherwise, residents will have to wait to the end of the meeting to hear committee responses to their comments.

There is no other alternative currently than for members to listen to the entire committee meeting.

This is because, to my knowledge, the only meetings that are saved and available for resident retrospective review are board meetings. In contrast, committee meeting recordings are for the benefit of the secretary and once the meeting minutes are completed, the Granicus recording is not saved. This again emphasizes why it would be in the best interest of our residents to move member comments to the beginning of the meeting to insure maximum participation and allow individuals to hear committee responses to their concerns."

Jeri Miller (2030-C) *"Can someone please explain to me why I have mud in front of my house where there used to be grass? All throughout this pandemic, I have seen the landscapers taking care of the golf course even when it was closed. I saw some workers taking care of the golf course on Sunday. I was aware my homeowner's dues supplemented the golf course but am stunned it takes precedent over my residence. I have been trying for 3 years to get some traction on the landscape. I am so tired of*

tracking mud in my home. I would like permission to take care of it myself since the corporation has ignored us. All the neighbors in this area would sign off on us taking care of this area. albeit, the portion of our dues that should be taken off our monthly obligation since we are not getting any service anyway."

21. Response to Member Comments

Chair Torng said he will address Mr. Rader's comment with staff and will take it into account when planning subsequent meetings.

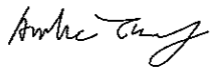
Mr. Wiemann indicated that staff has met with Ms. Miller and let her know that the trees do not allow the turf to grow underneath. Chair Torng stated he will contact this resident.

22. Committee Member Comments

None.

23. Date of Next Meeting – Thursday, March 11, 2021 at 9:30 a.m.

24. Adjournment at 11:40 a.m.

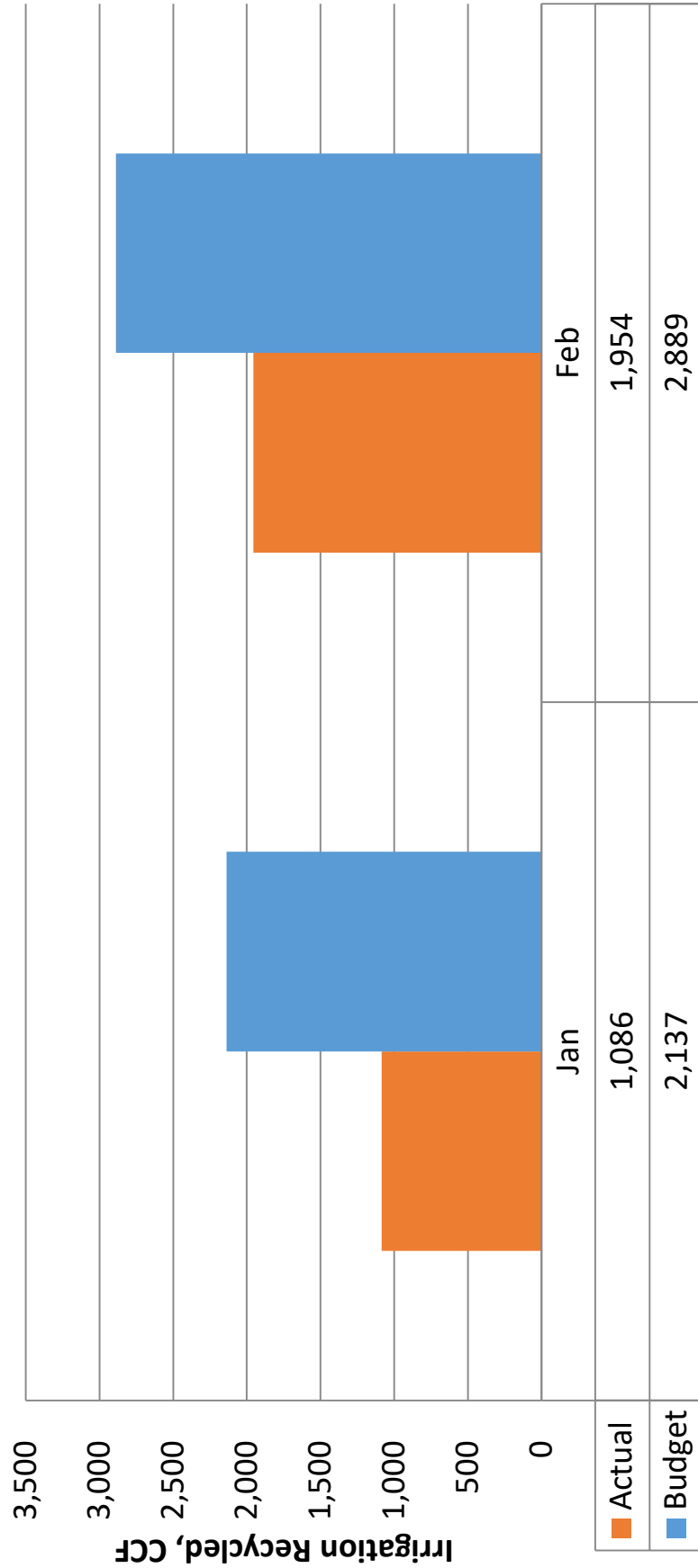


Andre Torng, Chair

United Mutual Landscape Project Log April 8, 2021 2021 Reserve Fund Projects								
Project	Work Unit	Description	Status	Estimated Completion	Completion	Budget	YTD*	Balance
Improvement and Restoration	Staff	Elimination of highest water using turf areas; replacing with water efficient landscapes.	Locations approved by Committee 3/11/20	TBD	0.00%	\$ 317,140.31	0	\$317,140.31
Turf Reduction	TBD, Staff	Areas to eliminate inefficient maintenance and high water usage; replace with easier to maintain/water efficient landscape.	TBD	TBD	0.00%	\$ 69,207.64	0	\$69,207.64
Slope Renovation/Maintenance	Misison Landscape	Annual cutting back and removal of vegetation on slopes. Maintenance thereafter.	Work began in February	Annual	5.34%	\$ 99,518.00	\$ 5,316.08	\$94,201.92
Tree Maintenance	West Coast Arborists	The annual program a combination of contracted work and in-house staff, working on a 5 year species-based trim cycle. Contractor performs mainly scheduled annual maintenance and isolated removals. Staff crew focuses on customer service.	Contracted tree crews trimmed 0 trees, removed 3 trees and planted 0 new trees.	Annual	0.83%	\$ 402,397.00	\$ 3,357.00	\$399,040.00
	In-House Tree Crew		As of February 28, 2021, the in-house crew trimmed 11 and removed 9 trees.		11.80%	\$ 531,161.14	\$ 62,703.21	\$468,457.93
Operations Contracts								
Grounds Maintenance Services	Adams Landscape	This annual program includes grounds maintenance services and herbicide spraying for buildings 2001-2108, 2121-2125, 2130, 2137-2165, 2183-2191, and 2209-2220.	In February, the contracted crew performed landscape services for buildings 2001-2070, 2094, and 2096-2098 totaling 74 buildings. As of February 28, 2021, they have trimmed 106 buildings.	Annual	20.07%	\$ 213,015.24	\$ 42,760.00	\$170,255.24

*Completion based upon invoices received to-date; 3/25/2021

United Mutual - Recycled Water Irrigation Actual vs Budget Consumption 2021 Trends





STAFF REPORT

DATE: April 8, 2021

FOR: Landscape Committee

SUBJECT: Request to Keep Potted Plants in Common Area (Zhao) – 329-D

RECOMMENDATION

- Deny the request to keep potted plants in common area.
- Direct staff to replant the bare areas in the shrub bed adjacent to 329-D.

BACKGROUND

This item was tabled at the committee meeting on 2/11/21 and again at the 3/11/21 meeting.

Ms. Zhao became a Member in August 2020. In October 2020, the member was cited by Compliance for clutter, having excessive potted plants and also other items in the common area around her unit (Attachment 1). She has removed some of the items and is requesting to retain the balance left in the common area (Attachment 2).

DISCUSSION

The multiple items which have been placed in the common area include potted plants, shelves, lights etc., and are a violation of the Clutter Policy (Attachment 3). The clutter impedes the landscape staff from maintaining the area, and also interferes with the proper function of the irrigation system.

Staff recommends removal of the items remaining in the common area and replanting the area with new shrub material to match adjacent plantings.

FINANCIAL ANALYSIS:

The cost to replant the area is estimated to be \$250.

Prepared By: Bob Merget, Landscape Manager
Reviewed By: Kurt Wiemann, Director of Landscape Services

ATTACHMENT(S)

Attachment 1: Photographs
Attachment 2: Mutual Landscape Request Form
Attachment 3: Clutter Policy

ATTACHMENT 1





12/30/2020

Laguna Woods Village

MUTUAL LANDSCAPE REQUEST FORM**PLEASE NOTE: THIS FORM IS NOT INTENDED FOR ROUTINE MAINTENANCE REQUESTS**

For all non-routine requests, please fill out this form. Per the policy of your Mutual, if your request falls outside the scope of the managing agent's authority, it will be forwarded to the Mutual's Landscape Committee for review. If you are unsure whether your request falls into this category, first contact Resident Services at 597-4600 in order to make that determination.

PLEASE RETURN COMPLETED REQUEST FORM TO RESIDENT SERVICES.**Resident/Owner Information**

You must be an owner to request non-routine Landscape requests.

329 D

Address

Helen Zhao

Resident's Name

12-28-2020

Today's Date

949-228-6551

Telephone Number

Non-Routine Request

Please checkmark the item that best describes your request. If none apply, please checkmark "Other" and explain.

☐ Tree Removal☒ New Landscape☐ Off-Schedule Trimming

☒ Other (explain): please allow me to put 30 plant pots (blue + white flower porcelain, cost \$2000, very pretty) in my garden, as new resident.

Reason for Request

Please checkmark the item(s) that best explain the reason for your request.

☐ Structural Damage☐ Sewer Damage☐ Overgrown☐ Poor Condition☐ Litter/Debris☒ Personal Preference

☒ Other (explain): please see attached letter.

GUIDELINES:

- **Structural/Sewer Damage:** Damage to buildings, sidewalks, sewer pipes, or other facilities may justify removal if corrective measures are not practical.
- **Overgrown/Crowded:** Trees or plants that have outgrown the available space may justify removal.
- **Damaged/Declining Health:** Trees or plants that are declining in health will be evaluated for corrective action before removal/replacement is considered.
- **Litter and Debris:** Because all trees shed litter seasonally, generally this is not an adequate reason to justify removal. However, if granted, removal/replacement may be at the resident's expense.
- **Personal Preference:** Because one does not like the appearance or other characteristics of the tree or plant generally does not justify its removal. However, if granted, removal/replacement is usually at the resident's expense.

Description & Location of Request

Please briefly describe the situation and the exact location of the subject of the request (e.g., "roots of pine tree in front of manor XYZ are lifting the sidewalk"). Attach pictures as necessary.

in my Garden, see attached letter.

Signatures of All Neighbors Affected By This Request

Because your request may affect one or more of your neighbors, it is imperative that you obtain their signatures, manor numbers, and whether they are for, undecided, or against this request.

Signature	Manor #	For	Undecided	Against
Helen Zhao	329D			

(Please attach a separate sheet if more signatures are necessary.)

Acknowledgement - Owner

By signing, you are acknowledging this request.

Helen Zhao

Owner's Signature

Helen zhao

Owner's Name

OFFICE USE ONLY

MOVE-IN DATE: _____

DATE: _____ INITIALS: _____

530 _____ 540 _____

570 _____ LAST PRUNED: _____

RELANDSCAPED: _____

NEXT TIME: _____

TREE SPECIES: _____

COMMENTS: _____

TREE VALUE: _____ TREE REMOVAL COST: _____

Dear Mr. Jacob,
Thanks for the quick reply.



1. I have removed the storage chest from my garden
 2. I have removed 12 and 10= 22 red pots from my garden
- And Will only keep 30 beautiful pots in the garden (blue and white porcelain, cost \$2000),
Please allow me to keep them.

My seller did not do anything in the garden,
it looks like a bare land with a lot of weeds.
I hired 2 people , and worked very hard to make it beautiful.
My neighbor said that "you increased the value of the house
for the neighborhood.

40

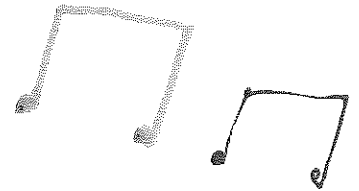
One of my neighbor got 50 big pots, and I only have 30 small one now,
Hope I will be treated equally with others, no matter I am Asia or white woman.

Thanks for your understanding and help

Happy New Year !

Helen zhao
329-D
949-228-6551

Helen Zhao





Clutter Policy
Resolution 01-18-104; Adopted September 26, 2018

I. Purpose

The purpose of this policy is to set forth guidelines by United Laguna Woods Mutual (United) for the safety and prevention of damage from items placed by the residents in “Exclusive Use Common Area” and “Common Area.”

Please note that this list is **not** exhaustive and **any** item that is placed within the Mutual property, including but not limited to, the balcony, breezeway, carport, patio, interior and common area is subject to the aforementioned rules and regulations of the Mutual.

II. Definitions

- a. Exclusive Use Common Area – a portion of the common area designated by the declaration for the exclusive use of one or more, but fewer than all, of the owners of the separate interests and which is or will be appurtenant to the separate interest or interests. Unless the declaration otherwise provides, any shutters, awnings, window boxes, doorsteps, stoops, porches, balconies, patios, exterior doors, doorframes, and hardware incident thereto, screens and windows or other fixtures designed to serve a single separate interest, but located outside the boundaries of the separate interest, are exclusive use common area allocated exclusively to that separate interest (i.e. patios, balconies, carport and interior of a Unit). (Civil Code §4145)
- b. Clutter - to fill or litter with things in a disorderly manner; a collection of things lying about in an untidy mass. (cluttered. (n.d.) *Burton's Legal Thesaurus, 4E.* (2007)) In addition, anything positioned within the Mutual property in a manner which is obstructing the free use of the area, creating a health and safety risk to the community, and/or consequently causing property damage within the Mutual. See further details under Conditions.
- c. Common Area - the entire common interest development except the separate interests therein (i.e. walkways, breezeways, and open space). (Civil Code §4095)
- d. Community – Laguna Woods Village.
- e. Golden Rain Foundation (GRF) – the Golden Rain Foundation of Laguna Hills, a California nonprofit mutual benefit corporation.
- f. Governing Documents – all of the following, collectively, the Articles of Incorporation; the Bylaws; Occupancy Agreements; the Rules and Regulations; and any Resolutions or Policies of the Board; all the same may be lawfully amended or modified from time to time.

- g. Interior Clutter – any items that are hazardous or may be of fire or safety danger, and/or potential damage to the inside of the Unit or surrounding Units.
- h. Member – Shareholder(s) entitled to Membership in the Corporation and approved by the Board of Directors. Also known as Shareholder(s).
- i. Resident is defined as any person who has been approved by the Board of Directors for occupancy.
- j. Staff - Employees of Village Management Services, Inc. authorized to act on behalf of United.
- k. United Laguna Woods Mutual (United) - is a non-profit cooperative housing corporation which owns and manages all real property within the original 21 cooperative Mutual's. In a cooperative, Shareholders are members of a corporation which own all real property, including the dwelling units, carports, and laundry facilities within the Mutual's boundaries, and each Shareholder is entitled to occupy a specific dwelling unit under the terms of an Occupancy Agreement. Also known as Corporation. Also known as the Mutual.

III. Conditions Clutter

Common areas are for the use and enjoyment of all residents and it is essential that all residents be aware of the need for the safety and prevention of damage to the buildings by items placed by the residents in or on the common areas of the Mutual's multi-story buildings and where applicable to other residential buildings.

The following rules for residents address the safety and prevention of damage issues. Residents should take whatever corrective action is necessary to manage those items they have placed outside their unit. Residents who disregard these guidelines will be given a citation to correct the problem, possibly followed with disciplinary action.

- 1. All plants must be suitably potted with adequately sized saucers to collect excess water and elevated by substantial castor or sturdy platforms. Care must be used to control the amount of water given to these plants so as not to run over the saucer and collect on the floor surface or fall to a lower level of the building on people, windows, or other objects belonging to neighbors.
- 2. Items, including plants, statues, furniture, etc., may be placed adjacent to a Unit's front door on the floor and shall be limited. Adequate clearance is required to allow for easy walkway access along the area (at least in number and size to allow for a 48-inch clearance as required by law.)
- 3. All plants shall be maintained by the resident in a healthy, well cared for condition, properly watered and pruned. Non-plant items shall be maintained clean and in good repair.

4. Potted plants are not to be placed on railings in common areas. Hanging plants or hanging objects are prohibited in breezeway and walkways.
5. Items that constitute a nuisance to one's neighbors should not be placed in common areas. Examples are intrusive wind chimes, food and water, which will attract birds, insects, and other animals. (City of Laguna Woods Municipal Code Section 5.20.070) Residents are encouraged to resolve amicably differences or disputes involving such items.
6. A resident's balcony and patio area adjoining a unit is Exclusive Use Common Area. This area needs the same care & protection as the walkways and breezeways to prevent dry rot, decay and mold of surfaces. Therefore only a limited number of potted plants on the balconies of multistory buildings are allowed. No more than 15% of the total floor area of a balcony may be used for potted plants.
7. Landscape crews will not care for a resident's personal items placed in common areas unless arranged through the Customer Service Department as a chargeable service.

Any building, by majority decision, may establish additional rules for its own use, providing the rules are not in conflict with the above guidelines. United shall resolve any disputes or misunderstandings relating to Exclusive Use Common Areas and Common Areas.

Governing Documents: "The Member shall not permit or suffer anything to be done or kept in or about the dwelling unit or other premises of the Corporation which will increase the rate of insurance on any building or other property of the Corporation or on the contents thereof or which will obstruct or interfere with the rights of other members of the Corporation or annoy them by unreasonable noises or otherwise nor will it commit or permit any nuisance in or about the dwelling unit or other premises of the Corporation or commit or suffer any immoral or illegal act to be committed thereon." (Occupancy Agreement, Article 5, Use of Premises)

IV. Enforcement

United is authorized to take disciplinary action against a Member(s) whose dwelling may be found in violation of the Governing Documents. When a complaint is lodged regarding the occurrence of a violation, the Board of Directors has a fiduciary duty to investigate and impose, if appropriate, discipline as set forth in the Governing Documents.

The Board has the authority to impose monetary fines, suspend Member(s) privileges, and/or bring forth legal action. The Member(s) are entirely responsible for ensuring that the Governing Documents are followed by anyone they allow into the Community. This includes any Co-occupant, Lessee, Guest, Care Provider, Vendor, invitee or contractor.

A complaint may be registered by calling the Security Department at 949-580-1400 or the Compliance Division by calling 949-268-CALL or email to compliance@vmsinc.org.

Investigating clutter: a Security Inspector patrols the Community and should Staff identify objective evidence of clutter a Notice of Clutter Violation is issued. The Compliance Division will send a follow up notice advising the Member of the rules and requesting compliance.

For interior clutter: Staff will schedule an interior inspection to obtain photographs and determine the severity of the clutter, potential hazard, and damage to the property. Staff works closely with the Social Services Division and outside agencies on interior clutter violations.



STAFF REPORT

DATE: April 08, 2021

FOR: Landscape Committee

SUBJECT: Tree Removal Request: 703-C Calle Aragon (Passehl) - One Bottle Brush tree

RECOMMENDATION

Approve the request to remove one Bottle Brush tree.

BACKGROUND

Mr. Passehl became a Member in July 2013, and is requesting the removal of one Bottle Brush tree, *Callistemon spp.* The reasons cited by the resident for the removal are structural damage and overgrowth. There are no additional signatures on the Mutual Request Form (Attachment 1).

The tree was last pruned in November 2018. Future trimming is tentatively scheduled for fiscal year 2022 although an off-schedule clearance trim would be needed prior to the scheduled work due to the enlarged canopy resting on the roof.

The height of the tree is approximately 37 feet with a trunk diameter of approximately 14 inches. The tree is approximately 12 inches from the unit, two inches from the roof line, and is growing in the shrub bed area (Attachment 2).

DISCUSSION

At the time of inspection, the tree was found to be in good condition with no trunk damage and no visible pests or previous pest damage.

There are a number of surface roots. Many are girdling roots which grow in a circular or spiral pattern around the trunk, at or below the soil line, which gradually strangle the trunk. These types of roots generally start out while in the nursery container and were not corrected at the time of planting. Typically, the girdling roots would be separated from the root ball and cut out prior to planting.

Given the tight planter space and the proximity to the unit, it would be impossible to safely do any type of root pruning.

Given the proximity to the building, the tree trunk will eventually cause infrastructure damage to the roof line.

FINANCIAL ANALYSIS:

The cost to remove the tree is estimated at \$686. The cost to trim the tree is estimated at \$100 and the estimated value of the tree is \$3,260 based on the tree inventory data.

Prepared By: Bob Merget, Landscape Manager

Reviewed By: Kurt Wiemann, Director of Landscape Services

ATTACHMENT(S)

Attachment 1: Mutual Landscape Request Form

Attachment 2: Photographs

ATTACHMENT 1

Laguna Woods Village

MUTUAL LANDSCAPE REQUEST FORM

PLEASE NOTE: THIS FORM IS NOT INTENDED FOR ROUTINE MAINTENANCE REQUESTS

For all non-routine requests, please fill out this form. Per the policy of your Mutual, if your request falls outside the scope of the managing agent's authority, it will be forwarded to the Mutual's Landscape Committee for review. If you are unsure whether your request falls into this category, first contact Resident Services at 597-4600 in order to make that determination.

PLEASE RETURN COMPLETED REQUEST FORM TO RESIDENT SERVICES.

Resident/Owner Information

You must be an owner to request non-routine Landscape requests.

703-C

Address

2/21/2021

Today's Date

DONALD PASSELL

Resident's Name

(949) 558-8477

Telephone Number

Non-Routine Request

Please checkmark the item that best describes your request. If none apply, please checkmark "Other" and explain.

☒ Tree Removal

☐ New Landscape

☐ Off-Schedule Trimming

☐ Other (explain): _____

Reason for Request

Please checkmark the item(s) that best explain the reason for your request.

☒ Structural Damage ☐ Sewer Damage ☒ Overgrown ☐ Poor Condition

☐ Litter/Debris ☐ Personal Preference

☐ Other (explain): _____

GUIDELINES:

- Structural/Sewer Damage: Damage to buildings, sidewalks, sewer pipes, or other facilities may justify removal if corrective measures are not practical.
- Overgrown/Crowded: Trees or plants that have outgrown the available space may justify removal.
- Damaged/Declining Health: Trees or plants that are declining in health will be evaluated for corrective action before removal/replacement is considered.
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- Personal Preference: Because one does not like the appearance or other characteristics of the tree or plant generally does not justify its removal. However, if granted, removal/replacement is usually at the resident's expense.

Description & Location of Request

Please briefly describe the situation and the exact location of the subject of the request (e.g., "roots of pine tree in front of manor XYZ are lifting the sidewalk"). Attach pictures as necessary.

SEE ATTACHED DESCRIPTION AND PHOTOS.

Signatures of All Neighbors Affected By This Request

Because your request may affect one or more of your neighbors, it is imperative that you obtain their signatures, manor numbers, and whether they are for, undecided, or against this request.

Signature	Manor #	For	Undecided	Against
NO NEIGHBORS AFFECTED				
PROPERTY BORDERS DETACHED				
GARAGES.				

(Please attach a separate sheet if more signatures are necessary.)

Acknowledgement - Owner

By signing, you are acknowledging this request.


Owner's Signature

Donald J. Russell
Owner's Name

OFFICE USE ONLY

MOVE-IN DATE: _____

DATE: _____ INITIALS: _____

530 _____ 540 _____

570 _____ LAST PRUNED: _____

RELANDSCAPED: _____

NEXT TIME: _____

TREE SPECIES: _____

COMMENTS: _____

TREE VALUE: _____ TREE REMOVAL COST: _____

ATTACHMENT 2











STAFF REPORT

DATE: April 8, 2021

FOR: Landscape Committee

SUBJECT: Performance Improvements: Increase Service Levels to Five Cycles

RECOMMENDATION

- Approve a Supplemental Allocation of \$267,480 to increase service levels to five cycles.

BACKGROUND

For fiscal year 2020, the Landscape Department had a budget for United Mutual of \$1,937,283 for shrub bed maintenance. The work is performed in four cycles annually; the shrub bed maintenance cycle varies seasonally and is performed on 75 shrub bed acres in United Mutual.

This report was originally presented to the Landscape Committee at the regular meeting on February 11, 2021, in which staff was directed to finalize equipment and staffing costs.

DISCUSSION

The current shrub bed maintenance service schedule is set at three-month intervals although it varies seasonally; servicing each building occurs with more frequency in the cooler months and less frequent in the warmer months due to turf maintenance requirements.

Within the budget mention above, the man-hour allocation is sufficient to perform four complete cycles; a cycle is considered complete when every building in that section has received shrub bed maintenance services. The industry standard for commercial landscape maintenance frequency for shrub bed service is monthly.

United Mutual is divided into four sections; Section One contains a portion of Third Mutual and the costs are apportioned by acreage. The sections are divided by geographical boundaries, acreage, and logistics (Attachment 1). Each section is assigned a separate crew, which varies in size from eight to ten staff, with a foreman in the lead position. The exception is Section One, which is contracted; it was the biggest crew with 11 men assigned to it.

Each year the Landscape Department receives numerous service requests (tickets); in 2020, 8,844 tickets were received, of those 56 percent were for grounds maintenance.

Many of these tickets were due to what is perceived by residents as inadequate maintenance; weeds growing too tall, shrubs overgrown, or soft edges not appearing maintained. Many of these concerns are rooted in the fact that maintenance crews only visit each building every three months, with the gap slightly longer in mowing season.

The Landscape Department has been directed to provide a cost analysis on the costs associated with increasing the landscaping service levels. Changing the current four trimming cycles to five annual cycles would decrease the time between visits to an average of every two months. This would have a definitively positive effect on the appearance of the landscaping by keeping the landscape looking trimmed and neater for a longer duration than the current schedule.

Common industry practice in southern California for commercial maintenance is typically monthly service for shrub beds. The current four-cycle schedule was implemented in 2016 during severe staffing cut backs; by reducing staff by 23 full-time employees (FTEs), the service levels were decreased from five cycles annually to four cycles annually. This was done as a cost saving measure.

The current analysis reveals it would require an additional two FTEs *per crew* (depending on acreage) to increase by one cycle, to five cycles annually. Increasing frequency by one cycle would incur an additional \$534,960 in labor and related costs annually to United Mutual. These costs reflect the addition of a total of 9 FTEs to the landscape staffing levels (Attachment 2). If the additional staff were added in 2021, a supplemental funding allocation for \$267,480 for six months would be required.

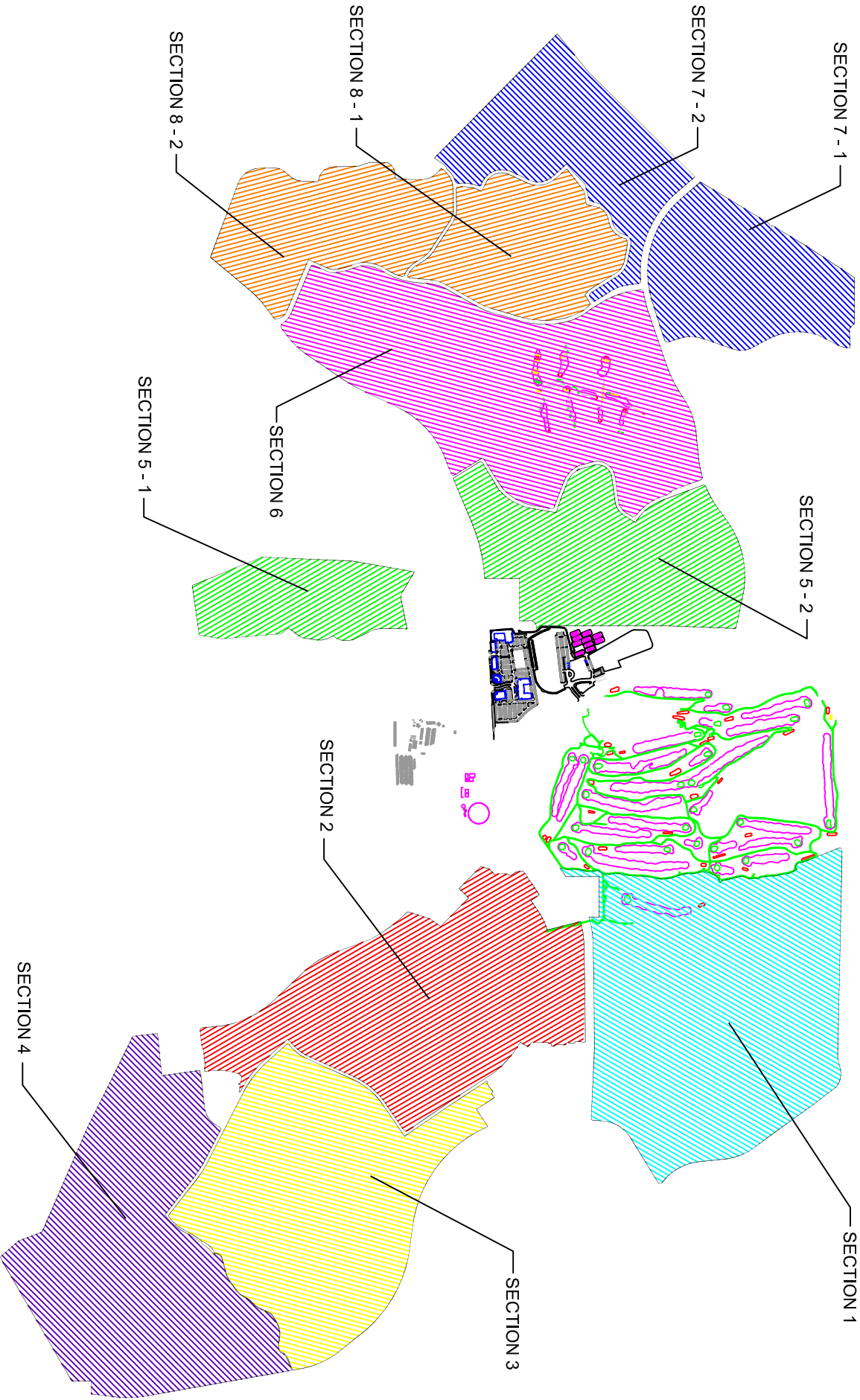
It is the opinion of staff that increasing the service levels by increasing the frequency of maintenance activities will result in higher resident satisfaction and significantly reduce the number of service requests and complaints.

FINANCIAL ANALYSIS:

See Attachment 3 and discussion above.

Prepared By: Kurt Wiemann, Director of Landscape Services
Reviewed By: Eve Morton, Landscape Coordinator

Attachment 1: Section Map
Attachment 2: Section Staffing Levels
Attachment 3: Cost Analysis for Increased Frequency of Maintenance



MAINTENANCE CREW AREA ASSIGNMENTS

AREA MAP

Laguna Woods Village® - Laguna Woods
Projects Department
24351 El Toro Road, Laguna Woods, California 92653
P.O. Box 2220, Laguna Woods, California 92654

ATTACHMENT 2

2021 Landscape Department Increased Service Levels Analysis					
Section Gardener Staffing Levels					
Section	1*	2	3	4	Total
Current	11	9	8	10	38
Additional	1	3	2	3	9

* Section 1 is currently 8 FTEs converted to contract funds and 3 staff Gardeners.

Section 1 is split between Third and United Mutuals.

ATTACHMENT 3

LANDSCAPE DIVISION
530 GROUNDS MAINTENANCE - 5 PRUNING CYCLES
UNITED LAGUNA WOODS MUTUAL

United Allocation - 9 FTEs

Grounds Maintenance Tasks	Percentage Allocation	Total Annual Reserves	Total 6 Months 2021:
Shrub bed plant replacement	25%	\$133,740	\$66,870
Re-establishment of shrub bed boundaries	50%	\$267,480	\$133,740
Small slope re-vitalization	10%	\$53,496	\$26,748
Re-establishment of shrub bed grades	15%	\$80,244	\$40,122
Total Expenses to Reserves:	100%	\$534,960	\$267,480
Total 6 Months For 2021:		\$267,480	



**UNITED LAGUNA WOODS MUTUAL
FUND EXPENDITURES REPORT
AS OF FEBRUARY 28, 2021**

DESCRIPTION	CURRENT MONTH		YEAR-TO-DATE		2021		VARIANCE	
	ACTUAL	BUDGET	ACTUAL	BUDGET	BUDGET	EXPENDED	\$	%
RESERVE FUND - LANDSCAPE								
REPLACEMENTS								
LANDSCAPE MODIFICATION		\$13,976	\$2,935	\$28,073	\$168,591	2%	\$25,138	90%
IMPROVEMENTS & RESTORATION	(\$78,373)	25,306	49,712	52,498	316,330	16%	2,786	5%
TREE MAINTENANCE	13,812	76,120	62,703	154,940	933,558	7%	92,237	60%
TOTAL RESERVE FUND	(\$40,975)	\$115,402	\$115,350	\$235,511	\$1,418,479	8%	\$120,161	51%
OPERATING EXPENDITURES - LANDSCAPE SERVICES								
LANDSCAPE ADMINISTRATION	\$14,627	\$18,304	\$32,082	\$38,263	\$234,842	14%	\$6,181	16%
NURSERY & COMPOSTING	19,997	15,021	34,253	30,924	187,358	18%	(3,329)	(11%)
GROUND MAINTENANCE	183,540	221,163	382,285	457,791	2,742,171	14%	75,506	16%
IRRIGATION	53,875	60,968	111,767	126,060	761,282	15%	14,293	11%
SMALL EQUIPMENT REPAIR	9,534	16,851	23,374	34,677	208,891	11%	11,303	33%
PEST CONTROL	19,799	18,068	38,225	37,354	225,820	17%	(871)	(2%)
TOTAL CONTINGENCY FUND	\$301,372	\$350,374	\$621,985	\$725,069	\$4,360,364	14%	\$103,084	14%

United Laguna Woods Mutual
Operating Statement
2/28/2021
SUMMARY: DEPARTMENT OF LANDSCAPE SERVICES

	Actual	YEAR TO DATE Budget	VAR\$ B/(W)	VAR% B/(W)	TOTAL BUDGET
Revenues:					
Non-Assessment Revenues:					
Fees and Charges for Services to Residents					
46502000 - Resident Maintenance Fee	\$59	\$3,046	(\$2,987)	(98.05%)	\$18,376
Total Fees and Charges for Services to Residents	59	3,046	(2,987)	(98.05%)	18,376
Total Non-Assessment Revenue	59	3,046	(2,987)	(98.05%)	18,376
Total Revenue	59	3,046	(2,987)	(98.05%)	18,376
Expenses:					
Employee Compensation					
51011000 - Salaries & Wages - Regular	21,507	23,940	2,433	10.16%	149,714
51021000 - Union Wages - Regular	267,396	357,576	90,180	25.22%	2,212,123
51041000 - Wages - Overtime	18	41	23	55.89%	249
51051000 - Union Wages - Overtime	516	324	(192)	(59.38%)	1,958
51061000 - Holiday & Vacation	48,731	32,469	(16,262)	(50.08%)	201,007
51071000 - Sick	28,744	13,244	(15,500)	(117.03%)	81,989
51081000 - Sick - Part Time	5	15	9	64.42%	92
51091000 - Missed Meal Penalty	20	31	11	35.00%	196
51981000 - Compensation Accrual	10,926	0	(10,926)	0.00%	0
Total Employee Compensation	377,865	427,641	49,776	11.64%	2,647,328
Compensation Related					
52411000 - F.I.C.A.	27,961	32,683	4,722	14.45%	202,330
52421000 - F.U.I.	1,957	2,488	531	21.34%	3,318
52431000 - S.U.I.	13,374	12,441	(933)	(7.50%)	16,589
52441000 - Union Medical	123,420	134,458	11,039	8.21%	806,750
52451000 - Workers' Compensation Insurance	20,779	29,129	8,349	28.66%	180,325
52461000 - Non Union Medical & Life Insurance	3,308	2,754	(555)	(20.15%)	16,521
52471000 - Union Retirement Plan	27,581	32,612	5,031	15.43%	201,752
52481000 - Non-Union Retirement Plan	657	1,072	416	38.78%	6,706
52981000 - Compensation Related Accrual	2,624	0	(2,624)	0.00%	0
Total Compensation Related	221,661	247,637	25,976	10.49%	1,434,289
Materials and Supplies					
53001000 - Materials & Supplies	19,724	26,269	6,545	24.91%	157,711
53003000 - Materials Direct	11,100	26,226	15,126	57.68%	157,418
53004000 - Freight	45	131	86	65.77%	795
Total Materials and Supplies	30,869	52,626	21,757	41.34%	315,924
Utilities and Telephone					
53302500 - Trash	0	151	151	100.00%	909
Total Utilities and Telephone	0	151	151	100.00%	909
Professional Fees					
53403500 - Consulting Fees	0	691	691	100.00%	4,145
Total Professional Fees	0	691	691	100.00%	4,145
Outside Services					
54603500 - Outside Services Cost Collection	14,155	108,770	94,615	86.99%	652,638
53704000 - Outside Services	1,954	3,405	1,451	42.62%	21,541
Total Outside Services	16,109	112,175	96,066	85.64%	674,179
Repairs and Maintenance					
53701000 - Equipment Repair & Maint	725	344	(381)	(110.80%)	2,074
Total Repairs and Maintenance	725	344	(381)	(110.80%)	2,074
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	70	70	100.00%	431
53801500 - Travel & Lodging	0	6	6	100.00%	39
53802000 - Uniforms	2,204	10,064	7,860	78.10%	35,879
53802500 - Dues & Memberships	0	50	50	100.00%	308
53803000 - Subscriptions & Books	0	5	5	100.00%	33
53803500 - Training & Education	100	761	661	86.81%	3,431
53903000 - Safety	0	97	97	100.00%	580

United Laguna Woods Mutual

Operating Statement

2/28/2021

SUMMARY: DEPARTMENT OF LANDSCAPE SERVICES

	<u>Actual</u>	<u>YEAR TO DATE Budget</u>	<u>VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
54002500 - Filing Fees / Permits	<u>0</u>	<u>105</u>	<u>105</u>	<u>100.00%</u>	<u>348</u>
Total Other Operating Expense	<u>2,304</u>	<u>11,158</u>	<u>8,854</u>	<u>79.35%</u>	<u>41,050</u>
Net Allocation to Mutuals					
54602500 - Allocated Expenses	<u>95,548</u>	<u>111,204</u>	<u>15,656</u>	<u>14.08%</u>	<u>677,321</u>
Total Net Allocation to Mutuals	<u>95,548</u>	<u>111,204</u>	<u>15,656</u>	<u>14.08%</u>	<u>677,321</u>
Total Expenses	<u>745,080</u>	<u>963,626</u>	<u>218,546</u>	<u>22.68%</u>	<u>5,797,219</u>
Excess of Revenues Over Expenses	<u>(\$745,021)</u>	<u>(\$960,580)</u>	<u>\$215,559</u>	<u>22.44%</u>	<u>(\$5,778,843)</u>

United Laguna Woods Mutual
Operating Statement
2/28/2021
500 - LANDSCAPE ADMIN

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Expenses:					
Employee Compensation					
51011000 - Salaries & Wages - Regular	\$18,637	\$20,181	\$1,544	7.65%	\$126,205
51041000 - Wages - Overtime	18	41	23	55.89%	249
51061000 - Holiday & Vacation	1,948	1,718	(230)	(13.41%)	10,741
51071000 - Sick	329	701	371	53.00%	4,381
51981000 - Compensation Accrual	544	0	(544)	0.00%	0
Total Employee Compensation	21,476	22,640	1,165	5.14%	141,576
Compensation Related					
52411000 - F.I.C.A.	1,519	1,729	210	12.14%	10,812
52421000 - F.U.I.	77	77	0	0.00%	102
52431000 - S.U.I.	523	383	(140)	(36.67%)	511
52451000 - Workers' Compensation Insurance	0	1,541	1,541	100.00%	9,636
52461000 - Non Union Medical & Life Insurance	2,473	2,296	(177)	(7.69%)	13,775
52481000 - Non-Union Retirement Plan	498	904	406	44.89%	5,653
52981000 - Compensation Related Accrual	45	0	(45)	0.00%	0
Total Compensation Related	5,134	6,929	1,795	25.90%	40,488
Materials and Supplies					
53001000 - Materials & Supplies	121	455	334	73.40%	2,736
Total Materials and Supplies	121	455	334	73.40%	2,736
Professional Fees					
53403500 - Consulting Fees	0	691	691	100.00%	4,145
Total Professional Fees	0	691	691	100.00%	4,145
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	5	5	100.00%	33
53802000 - Uniforms	15	101	86	85.53%	605
53802500 - Dues & Memberships	0	8	8	100.00%	51
53803000 - Subscriptions & Books	0	5	5	100.00%	33
53803500 - Training & Education	0	50	50	100.00%	298
53903000 - Safety	0	97	97	100.00%	580
Total Other Operating Expense	15	266	251	94.51%	1,602
Net Allocation to Mutuals					
54602500 - Allocated Expenses	7,238	7,282	44	0.60%	44,295
Total Net Allocation to Mutuals	7,238	7,282	44	0.60%	44,295
Total Expenses	33,984	38,263	4,279	11.18%	234,842
Excess of Revenues Over Expenses	(\$33,984)	(\$38,263)	\$4,279	11.18%	(\$234,842)

**United Laguna Woods Mutual
Operating Statement
2/28/2021
510 - IMPROVEMENT/RESTORATION**

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	\$19,100	\$22,210	\$3,110	14.00%	\$137,400
51051000 - Union Wages - Overtime	0	29	29	100.00%	179
51061000 - Holiday & Vacation	3,607	1,890	(1,717)	(90.81%)	11,694
51071000 - Sick	508	771	263	34.16%	4,770
51091000 - Missed Meal Penalty	20	0	(20)	0.00%	0
51981000 - Compensation Accrual	3,037	0	(3,037)	0.00%	0
Total Employee Compensation	26,272	24,900	(1,372)	(5.51%)	154,042
Compensation Related					
52411000 - F.I.C.A.	1,777	1,903	125	6.58%	11,771
52421000 - F.U.I.	127	150	23	15.25%	200
52431000 - S.U.I.	869	750	(119)	(15.82%)	1,000
52441000 - Union Medical	8,132	8,417	285	3.38%	50,499
52451000 - Workers' Compensation Insurance	582	1,696	1,114	65.67%	10,490
52471000 - Union Retirement Plan	1,944	2,041	97	4.76%	12,629
52981000 - Compensation Related Accrual	407	0	(407)	0.00%	0
Total Compensation Related	13,839	14,956	1,117	7.47%	86,589
Materials and Supplies					
53001000 - Materials & Supplies	139	734	596	81.10%	4,429
53003000 - Materials Direct	369	592	223	37.69%	3,571
Total Materials and Supplies	508	1,326	819	61.73%	8,000
Outside Services					
53704000 - Outside Services	0	237	237	100.00%	1,429
Total Outside Services	0	237	237	100.00%	1,429
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	3	3	100.00%	18
53802000 - Uniforms	95	559	464	83.06%	1,786
53803500 - Training & Education	0	23	23	100.00%	143
Total Other Operating Expense	95	584	490	83.81%	1,946
Net Allocation to Mutuals					
54602500 - Allocated Expenses	9,368	10,494	1,126	10.73%	64,324
Total Net Allocation to Mutuals	9,368	10,494	1,126	10.73%	64,324
Total Expenses	50,081	52,498	2,417	4.60%	316,330
Excess of Revenues Over Expenses	<u>(\$50,081)</u>	<u>(\$52,498)</u>	<u>\$2,417</u>	<u>4.60%</u>	<u>(\$316,330)</u>

United Laguna Woods Mutual
Operating Statement
2/28/2021
511 - NURSERY/COMPOSTING

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Expenses:					
Employee Compensation					
51011000 - Salaries & Wages - Regular	\$2,871	\$3,759	\$888	23.64%	\$23,509
51021000 - Union Wages - Regular	8,257	9,532	1,276	13.38%	58,970
51051000 - Union Wages - Overtime	460	0	(460)	0.00%	0
51061000 - Holiday & Vacation	2,411	1,131	(1,280)	(113.16%)	7,019
51071000 - Sick	391	461	70	15.18%	2,863
51981000 - Compensation Accrual	976	0	(976)	0.00%	0
Total Employee Compensation	15,366	14,884	(482)	(3.24%)	92,362
Compensation Related					
52411000 - F.I.C.A.	1,074	1,139	65	5.69%	7,066
52421000 - F.U.I.	71	76	5	6.46%	102
52431000 - S.U.I.	488	382	(106)	(27.84%)	509
52441000 - Union Medical	3,311	3,426	116	3.38%	20,559
52451000 - Workers' Compensation Insurance	333	1,015	682	67.18%	6,297
52461000 - Non Union Medical & Life Insurance	836	458	(378)	(82.62%)	2,746
52471000 - Union Retirement Plan	836	831	(5)	(0.61%)	5,141
52481000 - Non-Union Retirement Plan	158	168	10	5.94%	1,053
52981000 - Compensation Related Accrual	118	0	(118)	0.00%	0
Total Compensation Related	7,225	7,495	270	3.60%	43,472
Materials and Supplies					
53001000 - Materials & Supplies	6,710	2,018	(4,692)	(232.47%)	12,123
53004000 - Freight	15	12	(3)	(25.13%)	73
Total Materials and Supplies	6,724	2,030	(4,695)	(231.29%)	12,195
Utilities and Telephone					
53302500 - Trash	0	151	151	100.00%	909
Total Utilities and Telephone	0	151	151	100.00%	909
Outside Services					
53704000 - Outside Services	261	412	151	36.61%	3,566
Total Outside Services	261	412	151	36.61%	3,566
Other Operating Expense					
53802000 - Uniforms	48	327	280	85.46%	1,163
54002500 - Filing Fees / Permits	0	100	100	100.00%	100
Total Other Operating Expense	48	427	380	88.86%	1,263
Net Allocation to Mutuals					
54602500 - Allocated Expenses	4,628	5,525	897	16.23%	33,591
Total Net Allocation to Mutuals	4,628	5,525	897	16.23%	33,591
Total Expenses	34,253	30,924	(3,329)	(10.76%)	187,358
Excess of Revenues Over Expenses	(\$34,253)	(\$30,924)	(\$3,329)	(10.76%)	(\$187,358)

United Laguna Woods Mutual
Operating Statement
2/28/2021
530 - GROUNDS MAINTENANCE

	<u>Actual</u>	<u>YEAR TO DATE Budget</u>	<u>VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Revenues:					
Non-Assessment Revenues:					
Fees and Charges for Services to Residents					
46502000 - Resident Maintenance Fee	<u>(\$98)</u>	<u>\$1,157</u>	<u>(\$1,255)</u>	<u>(108.43%)</u>	<u>\$6,940</u>
Total Fees and Charges for Services to Residents	<u>(98)</u>	<u>1,157</u>	<u>(1,255)</u>	<u>(108.43%)</u>	<u>6,940</u>
Total Non-Assessment Revenue	<u>(98)</u>	<u>1,157</u>	<u>(1,255)</u>	<u>(108.43%)</u>	<u>6,940</u>
Total Revenue	<u>(98)</u>	<u>1,157</u>	<u>(1,255)</u>	<u>(108.43%)</u>	<u>6,940</u>
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	148,084	207,087	59,003	28.49%	1,281,130
51061000 - Holiday & Vacation	22,707	17,624	(5,083)	(28.84%)	109,032
51071000 - Sick	11,949	7,189	(4,760)	(66.21%)	44,473
51091000 - Missed Meal Penalty	0	7	7	100.00%	46
51981000 - Compensation Accrual	<u>3,154</u>	<u>0</u>	<u>(3,154)</u>	<u>0.00%</u>	<u>0</u>
Total Employee Compensation	<u>185,894</u>	<u>231,907</u>	<u>46,014</u>	<u>19.84%</u>	<u>1,434,682</u>
Compensation Related					
52411000 - F.I.C.A.	13,980	17,740	3,761	21.20%	109,750
52421000 - F.U.I.	1,089	1,600	511	31.95%	2,133
52431000 - S.U.I.	7,439	7,999	560	7.00%	10,665
52441000 - Union Medical	78,317	89,763	11,446	12.75%	538,576
52451000 - Workers' Compensation Insurance	11,505	15,811	4,306	27.23%	97,814
52471000 - Union Retirement Plan	17,271	21,771	4,500	20.67%	134,687
52981000 - Compensation Related Accrual	<u>1,461</u>	<u>0</u>	<u>(1,461)</u>	<u>0.00%</u>	<u>0</u>
Total Compensation Related	<u>131,062</u>	<u>154,684</u>	<u>23,622</u>	<u>15.27%</u>	<u>893,625</u>
Materials and Supplies					
53001000 - Materials & Supplies	5,024	6,731	1,707	25.36%	40,399
53003000 - Materials Direct	0	7,664	7,664	100.00%	46,009
53004000 - Freight	<u>0</u>	<u>77</u>	<u>77</u>	<u>100.00%</u>	<u>461</u>
Total Materials and Supplies	<u>5,024</u>	<u>14,471</u>	<u>9,447</u>	<u>65.28%</u>	<u>86,869</u>
Outside Services					
54603500 - Outside Services Cost Collection	17,936	24,918	6,982	28.02%	149,518
53704000 - Outside Services	<u>596</u>	<u>1,258</u>	<u>662</u>	<u>52.61%</u>	<u>7,549</u>
Total Outside Services	<u>18,532</u>	<u>26,176</u>	<u>7,644</u>	<u>29.20%</u>	<u>157,067</u>
Repairs and Maintenance					
53701000 - Equipment Repair & Maint	0	61	61	100.00%	369
Total Repairs and Maintenance	<u>0</u>	<u>61</u>	<u>61</u>	<u>100.00%</u>	<u>369</u>
Other Operating Expense					
53802000 - Uniforms	1,241	6,540	5,299	81.02%	23,085
53803500 - Training & Education	<u>0</u>	<u>231</u>	<u>231</u>	<u>100.00%</u>	<u>231</u>
Total Other Operating Expense	<u>1,241</u>	<u>6,771</u>	<u>5,530</u>	<u>81.67%</u>	<u>23,316</u>
Net Allocation to Mutuals					
54602500 - Allocated Expenses	41,402	49,795	8,393	16.86%	302,701
Total Net Allocation to Mutuals	<u>41,402</u>	<u>49,795</u>	<u>8,393</u>	<u>16.86%</u>	<u>302,701</u>
Total Expenses	<u>383,155</u>	<u>483,866</u>	<u>100,711</u>	<u>20.81%</u>	<u>2,898,629</u>
Excess of Revenues Over Expenses	<u>(\$383,252)</u>	<u>(\$482,709)</u>	<u>\$99,456</u>	<u>20.60%</u>	<u>(\$2,891,689)</u>

United Laguna Woods Mutual
Operating Statement
2/28/2021
540 - IRRIGATION

	Actual	YEAR TO DATE Budget	VAR\$ B/(W)	VAR% B/(W)	TOTAL BUDGET
Revenues:					
Non-Assessment Revenues:					
Fees and Charges for Services to Residents					
46502000 - Resident Maintenance Fee	\$157	\$566	(\$409)	(72.27%)	\$3,425
Total Fees and Charges for Services to Residents	157	566	(409)	(72.27%)	3,425
Total Non-Assessment Revenue	157	566	(409)	(72.27%)	3,425
Total Revenue	157	566	(409)	(72.27%)	3,425
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	41,534	54,823	13,289	24.24%	339,162
51051000 - Union Wages - Overtime	56	0	(56)	0.00%	0
51061000 - Holiday & Vacation	9,580	4,666	(4,914)	(105.32%)	28,865
51071000 - Sick	4,623	1,903	(2,720)	(142.90%)	11,774
51091000 - Missed Meal Penalty	0	12	12	100.00%	77
51981000 - Compensation Accrual	1,268	0	(1,268)	0.00%	0
Total Employee Compensation	57,060	61,405	4,344	7.08%	379,877
Compensation Related					
52411000 - F.I.C.A.	4,268	4,697	428	9.12%	29,055
52421000 - F.U.I.	269	276	7	2.66%	368
52431000 - S.U.I.	1,835	1,379	(456)	(33.03%)	1,839
52441000 - Union Medical	14,953	15,476	523	3.38%	92,855
52451000 - Workers' Compensation Insurance	3,597	4,186	589	14.07%	25,895
52471000 - Union Retirement Plan	3,415	3,754	338	9.01%	23,221
52981000 - Compensation Related Accrual	220	0	(220)	0.00%	0
Total Compensation Related	28,556	29,767	1,211	4.07%	173,233
Materials and Supplies					
53001000 - Materials & Supplies	1,839	1,286	(552)	(42.94%)	7,726
53003000 - Materials Direct	10,731	17,970	7,239	40.28%	107,838
Total Materials and Supplies	12,570	19,256	6,687	34.72%	115,564
Outside Services					
53704000 - Outside Services	1,022	1,094	72	6.57%	6,567
Total Outside Services	1,022	1,094	72	6.57%	6,567
Repairs and Maintenance					
53701000 - Equipment Repair & Maint	725	257	(467)	(181.63%)	1,545
Total Repairs and Maintenance	725	257	(467)	(181.63%)	1,545
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	15	15	100.00%	97
53801500 - Travel & Lodging	0	6	6	100.00%	39
53802000 - Uniforms	286	1,146	860	75.06%	4,095
53803500 - Training & Education	0	192	192	100.00%	1,159
Total Other Operating Expense	286	1,360	1,074	78.99%	5,388
Net Allocation to Mutuals					
54602500 - Allocated Expenses	14,525	16,642	2,117	12.72%	101,604
Total Net Allocation to Mutuals	14,525	16,642	2,117	12.72%	101,604
Total Expenses	114,744	129,781	15,037	11.59%	783,779
Excess of Revenues Over Expenses	(\$114,587)	(\$129,215)	\$14,628	11.32%	(\$780,355)

United Laguna Woods Mutual
Operating Statement
2/28/2021
550 - SMALL EQUIPMENT REPAIR

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	\$9,152	\$13,115	\$3,963	30.22%	\$81,134
51051000 - Union Wages - Overtime	0	111	111	100.00%	668
51061000 - Holiday & Vacation	1,218	1,116	(102)	(9.14%)	6,905
51071000 - Sick	3,961	455	(3,506)	(770.13%)	2,816
51981000 - Compensation Accrual	336	0	(336)	0.00%	0
Total Employee Compensation	14,667	14,798	131	0.88%	91,523
Compensation Related					
52411000 - F.I.C.A.	1,096	1,123	27	2.42%	6,950
52421000 - F.U.I.	75	75	0	(0.01%)	100
52431000 - S.U.I.	511	374	(137)	(36.67%)	499
52441000 - Union Medical	4,056	4,198	142	3.38%	25,191
52451000 - Workers' Compensation Insurance	977	1,001	24	2.42%	6,195
52471000 - Union Retirement Plan	969	1,018	49	4.82%	6,300
52981000 - Compensation Related Accrual	88	0	(88)	0.00%	0
Total Compensation Related	7,773	7,791	17	0.22%	45,234
Materials and Supplies					
53001000 - Materials & Supplies	1,569	8,758	7,189	82.08%	52,566
53004000 - Freight	0	37	37	100.00%	223
Total Materials and Supplies	1,569	8,795	7,226	82.16%	52,789
Outside Services					
53704000 - Outside Services	0	67	67	100.00%	401
Total Outside Services	0	67	67	100.00%	401
Repairs and Maintenance					
53701000 - Equipment Repair & Maint	0	7	7	100.00%	45
Total Repairs and Maintenance	0	7	7	100.00%	45
Other Operating Expense					
53802000 - Uniforms	134	386	252	65.38%	1,514
Total Other Operating Expense	134	386	252	65.38%	1,514
Net Allocation to Mutuals					
54602500 - Allocated Expenses	2,557	2,835	278	9.82%	17,385
Total Net Allocation to Mutuals	2,557	2,835	278	9.82%	17,385
Total Expenses	26,699	34,677	7,978	23.01%	208,891
Excess of Revenues Over Expenses	<u>(\$26,699)</u>	<u>(\$34,677)</u>	<u>\$7,978</u>	<u>23.01%</u>	<u>(\$208,891)</u>

United Laguna Woods Mutual
Operating Statement
2/28/2021
560 - PEST CONTROL

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	\$15,058	\$16,569	\$1,510	9.12%	\$102,500
51051000 - Union Wages - Overtime	0	31	31	100.00%	191
51061000 - Holiday & Vacation	3,550	1,410	(2,140)	(151.73%)	8,723
51071000 - Sick	1,978	575	(1,403)	(243.87%)	3,558
51091000 - Missed Meal Penalty	0	6	6	100.00%	38
51981000 - Compensation Accrual	474	0	(474)	0.00%	0
Total Employee Compensation	21,059	18,591	(2,468)	(13.27%)	115,012
Compensation Related					
52411000 - F.I.C.A.	1,575	1,419	(155)	(10.95%)	8,781
52421000 - F.U.I.	96	80	(16)	(20.00%)	107
52431000 - S.U.I.	659	402	(257)	(63.99%)	536
52441000 - Union Medical	5,231	4,512	(719)	(15.94%)	27,070
52451000 - Workers' Compensation Insurance	1,404	1,265	(139)	(10.95%)	7,826
52471000 - Union Retirement Plan	1,245	1,094	(150)	(13.74%)	6,770
52981000 - Compensation Related Accrual	91	0	(91)	0.00%	0
Total Compensation Related	10,300	8,773	(1,528)	(17.41%)	51,090
Materials and Supplies					
53001000 - Materials & Supplies	3,522	5,620	2,098	37.33%	33,733
53004000 - Freight	30	6	(24)	(394.12%)	38
Total Materials and Supplies	3,552	5,626	2,074	36.86%	33,772
Outside Services					
53704000 - Outside Services	0	127	127	100.00%	766
Total Outside Services	0	127	127	100.00%	766
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	31	31	100.00%	191
53802000 - Uniforms	134	370	235	63.65%	1,378
53802500 - Dues & Memberships	0	15	15	100.00%	96
53803500 - Training & Education	15	159	143	90.34%	957
54002500 - Filing Fees / Permits	0	5	5	100.00%	249
Total Other Operating Expense	150	580	431	74.20%	2,871
Net Allocation to Mutuals					
54602500 - Allocated Expenses	3,163	3,656	493	13.48%	22,310
Total Net Allocation to Mutuals	3,163	3,656	493	13.48%	22,310
Total Expenses	38,225	37,354	(871)	(2.33%)	225,820
Excess of Revenues Over Expenses	<u>(\$38,225)</u>	<u>(\$37,354)</u>	<u>(\$871)</u>	<u>(2.33%)</u>	<u>(\$225,820)</u>

United Laguna Woods Mutual
Operating Statement
2/28/2021
570 - TREE MAINTENANCE

	<u>Actual</u>	<u>Budget</u>	<u>YEAR TO DATE VAR\$ B/(W)</u>	<u>VAR% B/(W)</u>	<u>TOTAL BUDGET</u>
Revenues:					
Non-Assessment Revenues:					
Fees and Charges for Services to Residents					
46502000 - Resident Maintenance Fee	\$0	\$1,323	(\$1,323)	(100.00%)	\$8,011
Total Fees and Charges for Services to Residents	0	1,323	(1,323)	(100.00%)	8,011
Total Non-Assessment Revenue	0	1,323	(1,323)	(100.00%)	8,011
Total Revenue	0	1,323	(1,323)	(100.00%)	8,011
Expenses:					
Employee Compensation					
51021000 - Union Wages - Regular	26,213	34,241	8,028	23.44%	211,827
51051000 - Union Wages - Overtime	0	153	153	100.00%	919
51061000 - Holiday & Vacation	3,711	2,914	(797)	(27.36%)	18,028
51071000 - Sick	5,005	1,189	(3,816)	(321.05%)	7,353
51081000 - Sick - Part Time	5	15	9	64.42%	92
51091000 - Missed Meal Penalty	0	6	6	100.00%	35
51981000 - Compensation Accrual	1,137	0	(1,137)	0.00%	0
Total Employee Compensation	36,071	38,516	2,445	6.35%	238,254
Compensation Related					
52411000 - F.I.C.A.	2,672	2,933	261	8.91%	18,146
52421000 - F.U.I.	154	154	1	0.57%	206
52431000 - S.U.I.	1,049	772	(277)	(35.89%)	1,030
52441000 - Union Medical	9,420	8,667	(754)	(8.70%)	51,999
52451000 - Workers' Compensation Insurance	2,381	2,614	233	8.90%	16,173
52471000 - Union Retirement Plan	1,901	2,102	201	9.58%	13,004
52981000 - Compensation Related Accrual	195	0	(195)	0.00%	0
Total Compensation Related	17,772	17,243	(529)	(3.07%)	100,558
Materials and Supplies					
53001000 - Materials & Supplies	801	666	(135)	(20.28%)	3,999
Total Materials and Supplies	801	666	(135)	(20.28%)	3,999
Outside Services					
54603500 - Outside Services Cost Collection	(3,781)	83,852	87,633	104.51%	503,120
53704000 - Outside Services	74	210	135	64.61%	1,264
Total Outside Services	(3,707)	84,062	87,768	104.41%	504,384
Repairs and Maintenance					
53701000 - Equipment Repair & Maint	0	18	18	100.00%	115
Total Repairs and Maintenance	0	18	18	100.00%	115
Other Operating Expense					
53801000 - Mileage & Meal Allowance	0	15	15	100.00%	92
53802000 - Uniforms	252	635	383	60.35%	2,253
53802500 - Dues & Memberships	0	27	27	100.00%	161
53803500 - Training & Education	85	107	22	20.26%	644
Total Other Operating Expense	337	783	446	56.98%	3,149
Net Allocation to Mutuals					
54602500 - Allocated Expenses	12,667	14,975	2,309	15.42%	91,110
Total Net Allocation to Mutuals	12,667	14,975	2,309	15.42%	91,110
Total Expenses	63,941	156,263	92,323	59.08%	941,570
Excess of Revenues Over Expenses	(\$63,941)	(\$154,940)	\$90,999	58.73%	(\$933,558)